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ABSTRACT

No major substantive changes from the 1980 guidelines for interlibrary lending in Wisconsin are made in this edition, which outlines the interlibrary loan responsibilities of borrowing and lending libraries; the operating assumptions, principles, and goals of the interlending program; the steps for developing area interlibrary loan plans; and the recommended interloan patterns for public, school, academic, special, and health science libraries in the state. It is noted that the second edition reaffirms the importance of area resource sharing, multitype library cooperation, a hierarchical interloan structure, and direct access to specific interloan collections. Changes noted include a recommendation that area interloan plans be reviewed and updated on an annual basis; an expansion of information on out-of-state interloan requests; a recommendation that area plan contact persons be asked to meet annually to discuss interlibrary loan problems, issues, and concerns; and an expansion and clarification of information to be included in area plans. Appendices provide lists of the membership, goals, and objectives of the Statewide Committee on Interlibrary Loan and Reference Referral Patterns in Wisconsin and a county map showing interlibrary loan areas. (ESR)

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WISCONSIN INTERLIBRARY LOAN GUIDELINES

SECOND EDITION
June 1982

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Bulletin No. 3107

TABLE OF CONTENTS

	Page
Preface	i-iii
Introduction	
Interlibrary Loan Responsibilities	1
Definitions and Abbreviations	2
Assumptions, Principles and Goals	4
Area Interlibrary Loan Plans	8
Wisconsin Interloan Patterns	
Diagram of Recommended Patterns	10
I. Public Libraries	11
II. School Libraries	13
III. Academic Libraries	15
IV. Special Libraries	17
(Includes state institution, state agency, business and industry, vocational school libraries, and health science library non-health related requests.)	
V. Health Science Libraries	19
(For health related materials.)	
Appendices	
A. Statewide Committee on Interlibrary Loan and Reference Referral Patterns in Wisconsin: Members 1980-82	20
B. Statewide Committee on Interlibrary Loan and Reference Referral Patterns in Wisconsin: Goal and Objectives 1980-82	21
C. Map: Interlibrary Loan Areas in Wisconsin	22

PREFACE

The first edition of the Wisconsin Interlibrary Loan Guidelines was published in May of 1980. These Guidelines were the result of eight months work by the Statewide Committee on Interlibrary Loan and Reference Referral Patterns in Wisconsin. The Committee was jointly sponsored by the Division for Library Services, Council of Wisconsin Librarians and Council on Library Development.

The recommendations for interloan in the 1980 edition of the Guidelines were a first attempt to codify interloan patterns for all types of libraries for Wisconsin in order to improve interloan efficiency. The patterns recommended were voluntary and in many ways followed existing interloan patterns. There were, however, some major recommended changes in the Guidelines from what had been current interloan practice. Some highlights of the first edition of the Guidelines were:

- The recommended patterns reflected a hierarchical structure for the overall state interloan network. Starting at the local library level, libraries were asked to clear area resources first, state-level resources next, and then proceed to out-of-state resources.

- The recommended patterns were basically the same regardless of type of library. An attempt was made to bring all types of libraries into one statewide interloan network, taking into account necessary unique differences, but emphasizing similarities.

- The recommended patterns opened up direct access to Reference and Loan, WILS and Milwaukee Public by libraries designated as area clearinghouses or direct access libraries.

- The recommended patterns were based on strong area interloan programs. Area resource sharing was encouraged and supported throughout the Guidelines.

- It was recommended that an area plan be developed which showed how resources in an area of the state were being shared. This area plan was to be sent to the Statewide Interloan Committee for review and acceptance.

After the first edition of the Guidelines was published, the Division for Library Services and the Council of Wisconsin Librarians continued to co-sponsor the Statewide Committee on Interlibrary Loan and Reference

Referral Patterns In Wisconsin (with some revisions in membership). The major goals of this continuing Committee were to review and accept interlibrary loan plans from areas of the state and to review, evaluate and propose modifications in the Wisconsin Interlibrary Loan Guidelines, if necessary.

At meetings in November, 1980, March and September, 1981, and February and April of 1982, the Committee carried out its responsibilities.

Members of the Statewide Interloan Committee were pleased with the response to the Wisconsin Interlibrary Loan Guidelines. Comments made to Committee members indicated that the Guidelines had been generally well received by the Wisconsin library community and did indeed provide positive direction for interloan transactions statewide.

Members of the Statewide Interloan Committee were also pleased with the response to the recommendation that area interloan plans be developed. Not only did most areas of the state develop such a plan, but the plans showed a remarkable degree of planning for interlibrary loan and sharing among all types of libraries in the various areas. Sixteen area plans were submitted to the Committee for review and discussion. The plans covered interloan operations in 65 of the 72 counties in Wisconsin. In addition, planning for interloan was taking place or was scheduled to take place in six of the seven remaining counties.

This second edition (revised) of the Wisconsin Interlibrary Loan Guidelines is being produced at the recommendation of the Statewide Interloan Committee. A systematic review of the Guidelines indicated that although the Committee recommended no major substantive changes from the first edition, there were enough changes to warrant a revised edition. In several places in the Guidelines information needed to be expanded or clarified. Some of the highlights of the second edition of the Wisconsin Interlibrary Loan Guidelines are:

- a recommendation that area interloan plans be reviewed and updated on an annual basis and changes submitted to the Statewide Interloan Committee.

- an expansion of information on out-of-state interloan requests.

- a recommendation that area plan contact persons be asked to meet together annually to discuss interlibrary loan problems, issues, and concerns.

- an expansion and clarification of information to include in area plans.

The Guidelines, second edition, reaffirm the importance of area resource-sharing; the hierarchical interloan structure recommended in the first edition; the recommendation to open up direct access to RLL,

WILS, and MPL; the importance of all types of libraries working together; and many of the other important principles, assumptions and goals contained in the first edition of the Guidelines.

The Statewide Interloan Committee recommended that the Division for Library Services and Council of Wisconsin Librarians continue to co-sponsor a statewide interloan committee. Among the continuing responsibilities of that committee would be:

- to assess the impact of statewide planning efforts and studies on interlibrary loan.
- to discuss and make recommendations on reference referral requests.
- to study alternative in-state and out-of-state interloan patterns and their effect on interloan volume, speed, costs and fill rates.
- to study the impact of union lists and other resource sharing tools on interloan patterns.
- to review and accept area interlibrary loan plans.

INTRODUCTION

Interlibrary Loan Responsibilities

The patterns recommended in these Guidelines are to provide direction for interlibrary loans among libraries in the State of Wisconsin. These Guidelines are based on the premise that lending among libraries for the use of an individual in the State of Wisconsin is in the public interest and should be encouraged. However, liberal lending should be no substitute for the development of adequate collections based on the needs of the service areas represented in libraries and library systems.

Purpose

Since it is increasingly evident that it is impossible for any individual library to be self-sufficient, and in the belief that the furtherance of knowledge is in the public interest, interlibrary borrowing and lending is regarded by the libraries abiding by these guidelines as essential to library service.

Responsibility of Lending Libraries

Libraries will practice as liberal and unrestrictive a lending policy as is possible in interlibrary loans, with due consideration to the interest of their primary clientele.

Responsibility of Borrowing Libraries

It is recognized that interlibrary lending does not relieve any library of the responsibility for developing its own collection. Each library will provide the resources to meet the recurring study, educational, instructional, informational, and research needs of its users. Requests to borrow from other libraries will be limited to those items which the library might not be expected to own. No library should depend upon another to supply the normal needs of its clientele except under special agreement for such service.

Scope

Any type of library material or information needed for the purposes of study, instruction, information, or research may be requested on loan or in photocopy from another library. The lending library has the privilege of deciding in each case whether a particular item should or should not be provided, and whether the original or a copy should be sent. These decisions may be determined by the nature of the material, its physical condition or the degree of active demand for the material requested.

INTRODUCTION

Definitions and Abbreviations

This document utilizes terms which may be perceived differently by various librarians or other users of the Guidelines. Certain terms are defined here as they are used in the Guidelines.

Area:

1. For libraries located in an area where there is a multitype library organization, the area is defined as that of the multitype library organization.

2. For libraries located in an area where there is no multitype library organization, but where there is a public library system, the area is defined as that of the public library system.

3. For libraries located in an area where there is not a public library system or area multitype library organization, the area is defined as the county in which the library is located.

(Note: Health science libraries will relate to the resource sharing areas for non-health related materials as individual libraries and relate to their health science consortium/network for health science requests.)

Area Clearinghouse:

A library or library organization which receives and refers interlibrary loan requests on behalf of other libraries within a defined area. The library or library organization may also fill requests.

Direct Access Library:

A library or library organization which has the ability and authority to send requests directly to RLL, WILS and MPL. An area clearinghouse automatically has direct access. Other libraries in an area may have direct access if so designated in an area interloan plan which has been accepted by the Statewide Interloan Committee. For example, a direct access library is a library which generates a large number of requests on its own and has the appropriate tools to clear the area on its own.

Interlibrary Loan:

A transaction in which library material, or copies of the material, are made available by one library or information service to another upon request.

Dedicated Interloan Collection/Service:

Service or collection used primarily as backup for filling interlibrary requests.

WILS - Wisconsin Interlibrary Services
RLL - Reference and Loan Library
MPL - Milwaukee Public Library
WULS - Wisconsin Union List of Serials
MINITEX - Minnesota Inter-Library Teletype Exchange
MHSLN - Midwest Health Science Library Network
OCLC - On-Line Computer Library Center, Inc.

INTRODUCTION

Assumptions, Principles and Goals

The Wisconsin Interlibrary Loan Guidelines are based on certain principles which are in turn based upon certain assumptions. For example, the recommended patterns for interlibrary loan and reference referral depend heavily on the principle that "resources in an area should be explored and utilized before state level resources are tapped." That principle is based on the assumption that "all areas have some resources to share."

Other basic, shared assumptions, principles and goals are included here to explain the context in which the Guidelines were developed. This list may not be exhaustive, but does provide some background material for users of the Guidelines.

Assumptions	Principles	Goals
1. It is cost efficient to build on existing strengths. All types of libraries and information services have occasion to use other types of libraries.	1. All types of libraries and information services should have access to all other types (directly or through a clearinghouse).	1. All types of libraries and information services (including those often forgotten, such as state agency, special, institutional, media centers, etc.) should be included in the statewide interlibrary loan plan.
2. Each area in the state will have a resource sharing plan in operation to enable it to exhaust area resources.	2. The contributions and needs of all types of libraries and information services should be included in area plans (school, special, public, academic and free standing information services.)	2. Each area in the state should plan a resource sharing operation which would enable libraries and information services in the area to exhaust local resources.
3. All areas have some resources to share. It is probably faster and more cost effective to utilize area resources before tapping state level resources.	3. Resources in an area should be explored and utilized before state level resources are tapped. State level resources should be used as a back-up to area resources.	3. Each area of the state should develop a plan which includes the patterns for interlibrary loan/reference referral within the area and which identifies the clearinghouse(s) and direct access library(ies) for the area.

Assumptions	Principles	Goals
4. Sharing is a two-way street.	4. Libraries and information services which participate as users should be willing to participate as providers.	4. Libraries and information services should adopt, insofar as possible, interloan policies conducive to sharing resources.
5. In the resource sharing process, some libraries and information services give far more than they receive. Some libraries and information services whose resources are in demand have neither the funding nor the mandate to provide this service.	5. To equalize access to information for the citizens of Wisconsin via not-for-profit libraries and information agencies and to reduce the strain on information rich resources, state funding should be available to support resource sharing activities.	5. State funding should be sought to provide the following back-up interloan and reference referral services to all types of libraries: - basic support for WILS and RLL as the two state-dedicated interloan collections/services. - supplementary funding for other heavily used state and area level resources (e.g., major net lenders).
6. The availability of holdings location information for Wisconsin libraries is now uneven.	6. Good holdings information is important for many resource sharing goals, including: - fast service - efficient service - equalizing the interloan load - resource development	6. Tools should be developed and maintained to show the location of Wisconsin's - - major state level resource library holdings - area library holdings for area use - unique resources
7. Direct patron access to another library may be preferable to an interlibrary loan transaction. It may be faster and less expensive to send a patron to a library.	7. Good holdings location information is important for many resource sharing goals, including: - expediting direct patron access when appropriate.	7. Areas should be encouraged to develop reciprocal direct patron access to all area libraries.

Assumptions	Principles	Goals
8. At present the OCLC data base is not a complete record of holdings information in Wisconsin because: - not all Wisconsin libraries are OCLC participants. - not all important resources are included. - not all withdrawals are uniformly reported. - not all holdings of some types of materials are listed (reports, AV materials, etc.)	8. In spite of its problems, OCLC forms a good basis for resource sharing because it is a major location identification and verification tool.	8. The following steps should be taken: - correct existing holdings information - add current holdings for as many as possible. - add retrospective holdings for as many libraries as possible. - give OCLC feedback on needed improvements.
9. OCLC may never be a suitable tool for recording some valuable Wisconsin holdings.	9. Methods other than OCLC for recording, reporting and accessing special collections and resources, such as the Statewide Data Base, should be explored.	9. All levels of the resource sharing network should explore alternate tools and methods for recording, reporting and accessing resources, such as the Statewide Data Base.
10. Wisconsin needs as complete a statewide union list of serials as possible.	10. As broad participation as possible in such a list should be encouraged and supported.	10. Continued development of a Wisconsin union list of serials should be encouraged through: - identification of collections for inclusion. - funding to allow participation. - development of methods and funding for updating.
11. Area union lists of materials are needed for area resource sharing as well as for the development of statewide union lists.	11. Area union lists of materials should be encouraged and supported.	11. Area union lists should be developed and each should be in a format compatible with national standards to allow for easy inclusion of all or part of the area list in statewide union lists.

Assumptions	Principles	Goals
12. Participating libraries need a mechanism for providing feedback about state level services. State level providers need to be able to plan state level library services in a coordinated comprehensive way.	12. All participating libraries need a voice in the coordination, planning, and operation of an interlibrary loan and reference referral network.	12. A coordinating mechanism should be developed which allows for: - input from users and providers, from the area and the state level; - regular review and revision of the interlibrary loan and reference referral patterns.
13. Some resources needed regularly by Wisconsin library users as a whole may not be collected at all or in sufficient numbers to meet the need; or if collected may not be readily available to secondary users of interlibrary loan.	13. Wisconsin needs state level resources and services to handle or coordinate requests for materials which are not otherwise available.	13. There is a need to study and address the need for these resources.
14. Not all materials needed by Wisconsin citizens will be found in Wisconsin.	14. The interloan and reference referral network should seek to develop Wisconsin's resources to meet most needs and tap regional and national sources when necessary in order to fully serve Wisconsin citizens.	14. The Wisconsin interloan and reference referral network should develop and make accessible: area and state level resources, and further, should improve its links with regional and national resources.

AREA INTERLIBRARY LOAN PLANS

Interlibrary loan or the sharing of resources among libraries within areas of the state is basic to the recommendations in these Guidelines. Every section of the Guidelines has implications for intra-area interlibrary loan and reference referral programs. The Committee did not develop a detailed design of how intra-area interlibrary loan would work or which area libraries should be designated to send requests to state level resource libraries (i.e., RLL, WILS or MPL). However, the Committee, wanting to ensure that area resources were exhausted before requests were referred to the state level, recommended that area libraries develop a plan for intra-area resource sharing.

Developing an Area Interlibrary Loan Plan

All areas of the state should develop a plan for the sharing of materials among all types of libraries within the area.

1. Who should develop the area plan.

   Planning or selecting an area plan for resource sharing should include representatives from all types of libraries in the area, from different geographic/demographic areas.

2. What the plan should include.

   The following information should be included in area interloan plans:

   A. The names of people involved in developing the plan and their representation (e.g., type of library, county, etc.).

   B. The patterns for sharing within the area, including the sharing patterns by type of library.

   C. The union lists and other tools used to locate materials and facilitate sharing.

   D. The names of area clearinghouses and direct access libraries*.

   E. Tha names of WILS members and public library system headquarters/resource libraries participating in the area plan.

   F. The names of major area libraries not participating in the area plan.

   G. The geographic area included in the plan.

   H. The name of the area plan contact person.

   I. Effective date of plan.

*See definitions on Page 2 of the Guidelines.

AREA RESOURCE SHARING PLANS

3. Who gets the plan at the state level.

The area plan should be sent to:

A. Betsy Merriam or Peg Branson
Division for Library Services
P.O. Box 7841
Madison, WI 53707

to be forwarded to the Statewide Interlibrary Loan Committee. The Committee will review the area plan to ensure overall compatibility with the Guidelines and to ensure the ability of state resource libraries to provide service.

4. Acceptance of the plan.

When the area interlibrary loan plan is accepted by the Statewide Interlibrary Loan Committee, the new interloan options outlined in the Guidelines can be used. When there is no accepted area plan, libraries can continue to use the interloan channels available to them before the Guidelines were written.

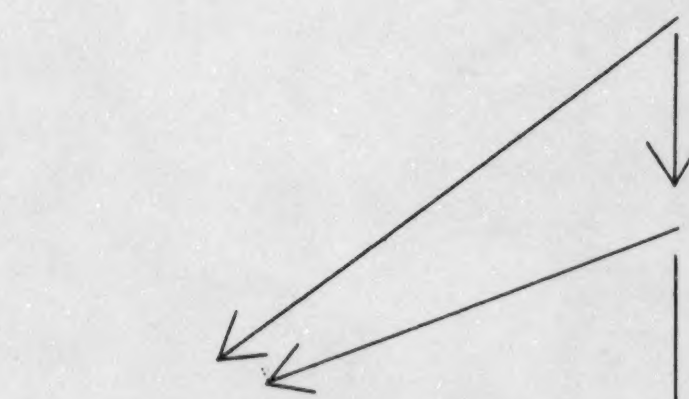
Area Interlibrary Loan Plan Review

Annually, the contact person identified in an area interlibrary loan plan will be asked to see that the area plan is reviewed and to submit any changes to the Statewide Interlibrary Loan Committee for review and acceptance.

Annually, contact persons identified in area interlibrary loan plans will be asked to meet together to discuss interlibrary loan problems, issues and concerns.

WISCONSIN INTERLOAN PATTERNS

DIAGRAM OF RECOMMENDED INTERLOAN PATTERNS


INDIVIDUAL LIBRARY LEVEL
AREA LEVEL
(CHECK RESOURCES IN AREA ACCORDING TO AREA PLAN; DESIGNATED AREA CLEARING-HOUSE(S) OR DIRECT ACCESS LIBRARIES ACCESS THE STATE LEVEL)
SPECIALIZED LIBRARIES/AGENCIES IN WISCONSIN OR OUT-OF-STATE
STATE LEVEL:
WILS, RLL, MPL REFERRAL TO EACH OTHER, SYSTEMS, ACADEMIC LIBRARIES, AND OTHER RESOURCES
OUT-OF-STATE
(THROUGH WILS AND RLL TO: MINITEX, ILLINOIS STATE LIBRARY, MHSLN, UNIVERSITY OF ILLINOIS; OTHERWISE DIRECT)

WISCONSIN INTERLOAN PATTERNS

I. PUBLIC LIBRARIES*

A. Library Level

Be certain that requests for materials or information cannot be filled from your own collection in a timely fashion.

B. Area Level

Send requests for materials or information not available in your own collection to any type of library and information service within your area, following the patterns established by the libraries in your area.**

C. Out-of-Area

1. State resource libraries

Send requests for materials or information not available in your area to a state level resource library via a designated area clearinghouse or directly, if you are a direct access library.*** The area clearinghouse or direct access library will:

(a) Send requests for materials identified on OCLC or in the Wisconsin Union List of Serials as being available from either RLL, Milwaukee Public Library or UW-Madison libraries through WILS, directly to RLL, WILS or MPL. If an item is identified on OCLC or in WULS as being held by more than one of those libraries, send to one of the libraries in the following order:

1. RLL
2. MPL
3. WILS

RLL and WILS will automatically refer requests they cannot fill to the following libraries/agencies (not listed in order of referral):

*Includes all public libraries, whether in a system or not. This could also be the pattern for other types of libraries if their requests are handled by public libraries or public library system headquarters.

**The definition of "area" is found on Page 2. A discussion of area resource sharing plans is found on Pages 12 through 13.

***The definitions of area clearinghouse and direct access library are found on Page 2.

WISCONSIN INTERLOAN PATTERNS

1. MPL: Refers unfilled requests back to the requesting library.
2. WILS: Refers unfilled requests to: RLL, MINITEX, MHSLN, University of Illinois, other academic libraries in Wisconsin.
3. RLL: Refers unfilled requests to: MPL, WILS, Illinois State Library, UW-Madison Information Services Division, public library systems in Wisconsin (excluding area of origin of request).

(b) Send all other requests for materials or information to RLL. (RLL will refer requests as in C.1.(a) above.)

2. Specialized resource libraries

Send requests for very specialized materials or information not available in your area and not likely to be available in C.1. above to any specialized state-level resource library or to any library in the state which has a specialized collection (e.g., State Historical Society; state agencies; UW-Madison, Information Services Division; Janesville Public Library Choral Music Collection; Gateway Technical Institute Hearing Impaired Collection) which will serve you directly and where a reasonable success ratio can be anticipated.

D. Out-of-state

When issuing out-of-state requests for materials or information not available in Wisconsin, Wisconsin libraries should follow patterns specified in state level reciprocal agreements when such exist (as in Section C.).

In other cases, send requests (according to your area plan) to any library which will serve you directly and where a reasonable success ratio can be anticipated (e.g., Library of Congress). In selecting an out-of-state resource library, proximity to Wisconsin should be considered; those nearest should be selected first. Specify on requests that Wisconsin State resources have been cleared.

For requests coming into Wisconsin, each library may follow its own lending policy. However, Wisconsin libraries should encourage out-of-state borrowers to follow state level reciprocal agreements when such exist. Out-of-state borrowers should also be requested to specify on their requests that their state or regional areas have been cleared.

WISCONSIN INTERLOAN PATTERNS

II. SCHOOL LIBRARIES

A. Library Level

Be certain that requests for materials or information cannot be filled from your own collection in a timely fashion.

B. Area Level

Send requests for materials or information not available in your own collection to any type of library and information service within your area, following the patterns established by the libraries in your area.* Note: School libraries participating in a CESA or other specialized information agency interloan program should utilize appropriate services also before going to the state level.

C. Out-of-Area

1. State resource libraries

Send requests for materials or information not available in your area to a state level resource library via a designated area clearinghouse or directly, if you are a direct access library.** The area clearinghouse or direct access library will:

(a) Send requests for materials identified on OCLC or in the Wisconsin Union List of Serials as being available from either RLL, Milwaukee Public Library or UW-Madison libraries through WILS, directly to RLL, WILS or MPL. If an item is identified on OCLC or in WULS as being held by more than one of those libraries, send to one of the libraries in the following order:

1. RLL
2. MPL
3. WILS

RLL and WILS will automatically refer requests they cannot fill to the following libraries/agencies (not listed in order of referral):

*The definition of "area" is found on Page 2. A discussion of area resource sharing plans is found on Pages 12 through 13.
**The definitions of area clearinghouse and direct access library are found on Page 2.

WISCONSIN INTERLOAN PATTERNS

1. MPL: Refers unfilled requests back to the requesting library.
2. WILS: Refers unfilled requests to: RLL, MINITEX, MHSLN, University of Illinois, other academic libraries in Wisconsin.
3. RLL: Refers unfilled requests to: MPL, WILS, Illinois State Library, UW-Madison Information Services Division, public library systems in Wisconsin (excluding area of origin or request).

(b) Send all other requests for materials or information to RLL. (RLL will refer requests as in C.1.(a) on the preceding page.)

2. Specialized resource libraries

Send requests for very specialized materials or information not available in your area and not likely to be available in C.1. above to any specialized state-level resource library or to any library in the state which has a specialized collection (e.g., State Historical Society; state agencies; UW-Madison, Information Services Division; Janesville Public Library Choral Music Collection; Gateway Technical Institute Hearing Impaired Collection) which will serve you directly and where a reasonable success ratio can be anticipated.

D. Out-of-state

When issuing out-of-state requests for materials or information not available in Wisconsin, Wisconsin libraries should follow patterns specified in state level reciprocal agreements when such exist (as in Section C.).

In other cases, send requests (according to your area plan) to any library which will serve you directly and where a reasonable success ratio can be anticipated (e.g., Library of Congress). In selecting an out-of-state resource library, proximity to Wisconsin should be considered; those nearest should be selected first. Specify on requests that Wisconsin State resources have been cleared.

For requests coming into Wisconsin, each library may follow its own lending policy. However, Wisconsin libraries should encourage out-of-state borrowers to follow state level reciprocal agreements when such exist.

Out-of-state borrowers should also be requested to specify on their requests that their state or regional areas have been cleared.

III. ACADEMIC LIBRARIES

A. Library Level

Be certain that requests for materials or information cannot be filled from your own collection in a timely fashion.

B. Area Level

Send requests for materials or information not available in your own collection to any type of library and information service within your area, following the patterns established by the libraries in your area.*

C. Out-of-Area

1. State resource libraries**

Send requests for materials or information not available in your area to a state level resource library via a designated area clearinghouse or directly, if you are a direct access library.*** The area clearinghouse or direct access library will:

(a) Send requests for materials identified on OCLC or in the Wisconsin Union List of Serials as being available from either RLL, Milwaukee Public Library or UW-Madison libraries through WILS, directly to RLL, WILS or MPL. If an item is identified on OCLC or in WULS as being held by more than one of those libraries, send to one of the libraries in the following order:

1. WILS
2. RLL
3. MPL

WILS and RLL will automatically refer requests they cannot fill to the following libraries/agencies (not listed in order to referral):

*The definition of "area" is found on Page 2. A discussion of area resource sharing plans is found on Pages 12 through 13.
**Direct access to WILS by members is not affected by these Guidelines.
***The definitions of area clearinghouse and direct access library are found on Page 2.

1. MPL: Refers unfilled requests back to the requesting library.
2. WILS: Refers unfilled requests to: RLL, MINITEX, MHSLN, University of Illinois, other academic libraries in Wisconsin.
3. RLL: Refers unfilled requests to: MPL, WILS, Illinois State Library, UW-Madison Information Services Division, public library systems in Wisconsin (excluding area of origin of requests).

(b) Send all other requests for materials or information to WILS if you are a WILS member.
(WILS will refer requests as in C.1.(a) above.)

2. Specialized resource libraries

Send requests for very specialized materials or information not available in your area and not likely to be available in C.1. above to any specialized state-level resource library or to any library in the state which has a specialized collection (e.g., State Historical Society; state agencies; UW-Madison, Information Services Division; Janesville Public Library Choral Music Collection; Gateway Technical Institute Hearing Impaired Collection) which will serve you directly and where a reasonable success ratio can be anticipated.

D. Out of-state

When issuing out-of-state requests for materials or information not available in Wisconsin, Wisconsin libraries should follow patterns specified in state level reciprocal agreements when such exist (as in Section C.).

In other cases, send requests (according to your area plan) to any library which will serve you directly and where a reasonable success ratio can be anticipated (e.g., Library of Congress). In selecting an out-of-state resource library, proximity to Wisconsin should be considered; those nearest should be selected first. Specify on requests that Wisconsin State resources have been cleared.

For requests coming into Wisconsin, each library may follow its own lending policy. However, Wisconsin libraries should encourage out-of-state borrowers to follow state level reciprocal agreements when such exist. Out-of-state borrowers should also be requested to specify on their requests that their state or regional areas have been cleared.

IV. SPECIAL LIBRARIES

(Includes state institution, state agency, business and industry, vocational school libraries,* and health science library non-health related requests.)

A. Library Level

Be certain that requests for materials or information cannot be filled from your own collection in a timely fashion.

B. Area Level

Send requests for materials or information not available in your own collection to any type of library and information service within your area, following the patterns established by the libraries in your area.**

C. Out-of-Area

1. State resource libraries

Send requests for materials or information not available in your area to a state level resource library via a designated area clearinghouse or directly, if you are a direct access library.*** The area clearinghouse or direct access library will:

(a) Send requests for materials identified on OCLC or in the Wisconsin Union List of Serials as being available from either RLL, Milwaukee Public Library or UW-Madison libraries through WILS, directly to RLL, WILS or MPL. If an item is identified on OCLC or in WULS as being held by more than one of those libraries, send to one of the libraries in the following order:

1. RLL
2. WILS
3. MPL

RLL and WILS will automatically refer requests they cannot fill to the following libraries/agencies (not listed in order of referral):

1. MPL: Refers unfilled requests back to the requesting library.

*Wisconsin vocational school libraries are post-secondary educational institutions with a very specialized mission. Since the interloan patterns for most of these libraries are similar to those of other special libraries, they are included in the Special Libraries category in the Guidelines.

**The definition of "area" is found on Page 2. A discussion of area resource sharing plans is found on Pages 12 through 13.

***The definitions of area clearinghouse and direct access library are found on Page 2.

2. WILS: Refers unfilled requests to: RLL, MINITEX, MHSLN, University of Illinois, other academic libraries in Wisconsin.
3. RLL: Refers unfilled requests to: MPL, WILS, Illinois State Library, UW-Madison Information Services Division, public library system in Wisconsin (excluding area of origin of requests).

(b) Send all other requests for materials or information to RLL. (RLL will refer requests as in C.1.(a) on the preceding page.)

2. Specialized resource libraries

Send requests for very specialized materials or information not available in your area and not likely to be available in C.1. above to any specialized state-level resource library or to any library in the state which has a specialized collection (e.g., State Historical Society; state agencies; UW-Madison, Information Services Division; Janesville Public Library Choral Music Collection; Gateway Technical Institute Hearing Impaired Collection) which will serve you directly and where a reasonable success ratio can be anticipated.

D. Out-of-state

When issuing out-of-state requests for materials or information not available in Wisconsin, Wisconsin libraries should follow patterns specified in state level reciprocal agreements when such exist (as in Section C.).

In other cases, send requests (according to your area plan) to any library which will serve you directly and where a reasonable success ratio can be anticipated (e.g., Library of Congress). In selecting an out-of-state resource library, proximity to Wisconsin should be considered; those nearest should be selected first. Specify on requests that Wisconsin State resources have been cleared.

For requests coming into Wisconsin, each library may follow its own lending policy. However, Wisconsin libraries should encourage out-of-state borrowers to follow state level reciprocal agreements when such exist. Out-of-state borrowers should also be requested to specify on their requests that their state or regional areas have been cleared.

V. HEALTH SCIENCE LIBRARIES

(For health related materials.*)

A. Library Level

Be certain that requests for materials or information cannot be filled from your own collection in a timely fashion.

B. Area Level

Send requests for materials or information not available in your own collection to any type of library and information service within your area, your WHSLN consortium and other consortia, as appropriate, following the patterns established by the libraries in your area.**

C. State Level

Send requests for materials or information not available at the area/consortium level to one of the two WHSLN Resource Libraries. Health Science libraries in the seven southeastern counties of Wisconsin should send requests to the Medical College of Wisconsin in Milwaukee. All other Wisconsin health science libraries should send requests to the UW-Madison Middleton Health Science Library. The UW-Madison Middleton Health Science Library or the Medical College of Wisconsin will refer requests to RLL or WILS as appropriate. Requests which should not be forwarded out of the health science network should be so identified by the original borrowing library.

D. Out-of-state

Requests not filled in the state for which specific holdings information can be found and for which sufficient bibliographic information is available will be forwarded automatically within the MHSLN and/or the National Library of Medicine and beyond.

*For non-health related materials, follow the ILL/RR patterns for special libraries, Section IV.

**The definition of "area" is found on Page 2. Health Science consortium ILL patterns are decided at the consortium level.

APPENDIX A

STATEWIDE COMMITTEE ON INTERLIBRARY LOAN AND REFERENCE REFERRAL PATTERNS IN WISCONSIN: Members 1980-82

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APPENDIX B

STATEWIDE COMMITTEE ON INTERLIBRARY LOAN AND REFERENCE REFERRAL PATTERNS IN WISCONSIN: GOALS AND OBJECTIVES 1980-82

Goals:

- To review and accept interlibrary loan plans from areas of the state.
- To review, evaluate and propose modifications in Wisconsin Interlibrary Loan Guidelines.
- To review, evaluate and propose modifications in the interloan Policy Statements of WILS, Milwaukee Public Library and Reference Loan Library.

Objectives:

- To study the usefulness and effectiveness of the Wisconsin Interlibrary Loan Guidelines
- To study and evaluate the impact of changes in statewide interloan patterns which resulted from recommendations in the Guidelines.
- To continue to analyze existing and possible interlibrary loan patterns and models.
- To continue to assess the impact of union lists and other resource sharing tools on interloan patterns, especially OCLC, the Milwaukee shelf list and the Wisconsin Union List of Serials.
- To consider the special nature of reference referral requests versus straight author/title requests.
- To assess the impact of the Wisconsin Library Network Plan project on interloan policies and patterns.
- To review and consider NEWIL Interlibrary Loan Study: An Evaluation and other relevant area interlibrary loan studies.
- To review and consider the recommendations of the statewide Automation Study Committee which relate to interlibrary loan.
- To study and make recommendations to the COLAND and DLS and COWL concerning an ongoing mechanism or agency to continue to monitor and revise, if necessary, the Wisconsin Interlibrary Loan Guidelines.
- To review and consider the recommendations of the Study Committee on the Feasibility of Regional Media Centers.

APPENDIX C

INTERLIBRARY LOAN AREAS IN WISCONSIN